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ABSTRACT

Supporting performance objectives 21, 25, and 26 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog both a set of student materials and an instructor's manual on specialized rules for alphabetical filing are included in this packet. (The packet is the second in a set of nine on maintaining files and a library--CE 016 939-947.) The student materials include information on filing unusual names, businesses, institutions, locations, and miscellaneous items; two student self-checks and a practice activity with simulated file cards and answer keys; a check-out activity; and an instructor's final checklist. The instructor's manual includes instructions for preparing this module for student use and a key for the check-out activity. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the nine packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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ED155429

FILING ALPHABETICALLY

SPECIALIZED RULES

STUDENT'S MANUAL

Materials in this Lesson
have been

Modified by
Sadie McLeod
and
Linda Dominick

from
Materials Developed and Graciously Provided by
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and
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CE 016 940

FILING ALPHABETICALLY–SPECIALIZED RULES

INTRODUCTION

Unusual names of persons, businesses, institutions, and geographic locations demand special consideration in filing systems. It is important that everyone follow the same rules if items are to be filed and retrieved efficiently and effectively. This LAP will enable you to master specialized rules for filing alphabetically and to apply these rules to the actual filing of special and unusual names.

DIRECTIONS

After you have completed module IV A, you are ready to begin filing alphabetically using specialized rules.

Read the Objectives below.

Complete the Learning Activities in the order given.

Materials needed: Pencil, paper, scissors, small file box (5 x 3)

OBJECTIVES

(1) Given 35 cards with instructions for filing alphabetically, index and file these cards. No more than 3 documents may be misfiled.

(2) Given 5 cards (included in the 35 above) requiring cross-references, prepare cross-reference cards and file. Four of the five cards must be cross-referenced correctly.

LEARNING ACTIVITIES

STUDY	1.	Study Instruction Sheet I–HYPHENATED AND COMPOUND NAMES.
CHECK	2.	Check Your Knowledge of filing hyphenated and compound names by completing Student Self-Check I.
STUDY	3.	Study Instruction Sheet II–MISCELLANEOUS ITEMS.
CHECK	4.	Check Your Knowledge of filing miscellaneous items by completing Student Self-Check II.
STUDY	5.	Study Instruction Sheet III–PRACTICE FILING USING SPECIALIZED RULES FOR FILING.
CHECK	6.	Arrange with your instructor to complete this module by performing the final Check-Out Activities.

Instruction Sheet I

HYPHENATED AND COMPOUND NAMES

Carefully study the rules for filing names of individuals and businesses with hyphenated and/or compound names. When you feel you understand the rules, check your knowledge by completing the Student Self-Check I.

1. HYPHENATED INDIVIDUAL NAMES: The hyphenated surname of an individual should be considered as separate indexing units.

   EXAMPLE: Anthony Armstrong-Jones

Unit 1	Unit 2	Unit 3
Armstrong-	Jones	Anthony

2. HYPHENATED BUSINESS OR FIRM NAMES: Hyphenated names in a firm or business should be considered as separate units.

   EXAMPLES: Jackson-Hines Men's Store
   Mary's Kut-N-Kurl

Unit 1	Unit 2	Unit 3	Unit 4
Jackson- Mary('s)	Hines Kut-	Men('s) N-	Store Kurl*

   *Cross-reference: Mary's Cut and Curl

3. BUSINESS OR FIRM NAMES WHICH INCLUDE COMPLETE NAMES OF INDIVIDUALS: When a firm's name includes the surname and one or more other parts of an individual's name, transpose the units in the name of the individual only.

   EXAMPLE: Ellen Young's Plant Shop

Unit 1	Unit 2	Unit 3	Unit 4
Young ('s)	Ellen	Plant	Shop

4. COMPOUND GEOGRAPHIC NAMES: The parts of compound geographic names should be considered as separate units, except when the first part of the name is not an English word, such as El Paso.

   EXAMPLES: El Paso Amusement Company
   South Carolina Historical Society

Unit 1	Unit 2	Unit 3	Unit 4
El Paso South	Amusement Carolina	Company Historical	Society

INSTRUCTION SHEET I con't.

5. ONE OR TWO WORDS: Words that may be written as either one or two words are indexed as one unit.

EXAMPLES: Air Port Lunch Room
Airport Taxi Service

Unit 1	Unit 2	Unit 3	Unit 4
Air Port	Lunch	Room	
Airport	Taxi	Service	

Turn the page and complete Student Self-Check I.

Student Self-Check I

Hyphenated and Compound Names

On a separate sheet of paper, index the following items by writing the appropriate number (1, 2, 3) above each unit. Determine the order in which each item within the small groups of names is to be filed. Write the number to the left of the name to indicate the correct order. Place nonindexing units in parentheses; write out abbreviations above the abbreviations; indicate cross references by placing an "X" to the right of the name. The first one is done for you to use as a guide; do not write on this sheet. When you are finished, Check your answers by page 27.

1. 1 (Mr.) 3 Anthony 1 Armstrong-Jones 2
   _____ Flack-Jones Lumber Company
   _____ Mr. Jose Pina-Anduzio
2. _____ Davis-Smith Construction Co.
   _____ Sam Soloman Co.
   _____ Sav-A-Stop Cafe
3. _____ Thinkan-Acton International
   _____ Thom McAn Shoe Store
   _____ Tri-County Development Board
4. _____ Mrs. Ellen P. Young
   _____ Ellen Young's Plant Shop
   _____ Allen-Young Plant Shop
5. _____ Wyn Shields Company
   _____ Wyman's Service Station
   _____ Mr. Samuel S. Wynn
   _____ Wynn's of Wyoming
   _____ Mr. Wm. S. Samuels

Instruction Sheet II

MISCELLANEOUS ITEMS

Carefully study the rules for filing Miscellaneous Items under specialized rules. When you feel you understand these rules, check your knowledge by completing the Student Self-Check II.

1. TITLE OR DEGREES: Titles and degrees are usually not considered as indexing units. Rather they are placed in parentheses after the last indexing unit, except where there is only one other name besides the title.

   EXAMPLES: The Reverend Teddy P. Dominick
   Dr. Parker Epting
   Mr. Thomas Ludwig, PhD.
   Princess Anne

Unit 1	Unit 2	Unit 3	Unit 4
Dominick	Teddy	P. (The Reverend)	
Epting	Parker (Dr.)		
Ludwig	Thomas (PhD.)		
Princess	Anne		

2. BANKS AND SCHOOLS: Banks and schools should be listed first by the name of the city in which the school or bank is located and then the next best identifying words. State names should be placed in parentheses and considered only if necessary.

   EXAMPLES: Boundary Street School, Newberry, SC
   First National Bank, Newberry, SC

Unit 1	Unit 2	Unit 3	Unit 4
Newberry (SC)	Boundary	Street	School
Newberry (SC)	First	National	Bank

3. NEWSPAPERS AND MAGAZINES: The name of a newspaper is always indexed by the city of publication, even if the title does not contain the name of the city. Names of magazines are considered in the order in which they appear.

   EXAMPLES: "The Dispatch-News", Lexington, SC
   "Reader's Digest"

Unit 1	Unit 2	Unit 3	Unit 4
Lexington (SC)	Dispatch-	News (The)	
Reader's	Digest		

4. CHURCHES: The denominations of churches, if known, are used for the key units. Otherwise, churches are indexed as written.

   EXAMPLE: First Baptist Church

Unit 1	Unit 2	Unit 3	Unit 4
Baptist	Church	First	

INSTRUCTION SHEET II (cont'd.)

5. COLLEGES AND UNIVERSITIES: The name of a college or university is indexed according to the most clearly identifying word in the name. City names, unless part of the college names, are not considered except when identical college names are involved.

   EXAMPLES: University of South Carolina

Unit 1	Unit 2	Unit 3	Unit 4
South	Carolina	University (of)	

6. HOTELS AND MOTELS: Hotels and motels are indexed as written unless some word other than the first identifies it more clearly. If the name itself includes "hotel" or "motel", transpose to follow the most clearly identifying word.

   EXAMPLE: Hotel Francis Marion

Unit 1	Unit 2	Unit 3	Unit 4
Francis	Marion	Hotel	

Turn the page and complete Student Self-Check II.

Student Self-Check II

Miscellaneous Items

On a separate sheet of paper, index the following items by writing the appropriate number (1, 2, 3) above each unit. Determine the order in which each item within the small groups of names is to be filed. Write the number to the left of the name to indicate the correct order. Place nonindexing units in parentheses; write out abbreviations above the abbreviations; indicate cross references by placing an "X" to the right of the name. Do not write on this sheet. Check your answers when completed by page 28.

1 _____ Col. Cecil S. Cook

_____ Sister Cecilia

_____ Sister Cecilia Cook

2. _____ First National Bank, Chicago, Illinois

_____ First National Bank, Hollywood, California

_____ First National Bank, St. Louis, Missouri

3. _____ The Newberry Observer, Newberry, S. C.

_____ The Summerville Scene, Summerville, S. C.

_____ The Dispatch-News, Lexington, S. C.

4. _____ Lutheran Church of the Redeemer

_____ Central Methodist Church

_____ St. Peter's Cathedral

5. _____ Hotel Francis Marion

_____ Hotel Wade Hampton

_____ The Carolina Inn

6. _____ Myers Park High School, Charlotte, N. C.

_____ Carver Elementary School, Columbia, S. C.

_____ Burke High School, Charleston, S. C.

7. _____ Clemson University

_____ University of Maryland

_____ Lenoir Rhyne College

Instruction Sheet III

PRACTICE FILING

Index and alphabetize the names on the Practice Filing Sheet. Cut the paper on the dotted lines so you can put the cards in the correct order. Where necessary, prepare a cross-reference on the blank cards that are provided by your instructor. When you have the cards in the correct order, place the number of the card and the name given on the card on the Practice Answer Sheet. If card P-2 needs a cross-reference, assign the number P-2X to the cross reference card. Card P-5's cross reference would be P-5X, etc. Card Number 1 has been completed to get you started. When you have finished, check your answers by page 29.

PRACTICE FILING

STUDENT'S ANSWER SHEET FOR INSTRUCTION SHEET III

Card No.	Name	Card No.	Name
		12	

Westmoreland, William (General)
1 2 3

Gen. Wm. Westmoreland

(E X A M P L E)

B-1

Citizens Bank & Trust Co.
New York, New York

B-2

E-Z Furniture Stripping Co.

B-3

Cut on broken lines to make index cards.

Index name on solid line above typed name.

The first card is given as an example.

Westminster Presbyterian Church

B-4

Charles Taylor's Grocery Store

B-5

El Taco Casa

B-6

Owens-Illinois Box Factory

B-7

Nu-Blen Coffee Co.

B-8

Winyah High School
Georgetown, S.C.

B-9

Mr. Jean-Paul Duverger

B-10

St. Peter's Catholic Church

B-11

Parkwood Elementary School
Durham, North Carolina

B-12

Amick-Martin Gravel Co.

B-13

Dr. Helen Sikes

B-14

Beth Shalom Synagogue

B-15

First Citizens Bank & Trust Co.
Rochester, N. Y.

B-16

Baptist College of Charleston
Charleston, S. C.

B-17

"Evening Herald"
Rock Hill, S. C.

B-18

S. C. Education Association

B-19

Hotel La Fiesta

B-20

Los Angeles Airport

B-21

Prof. Grady Whitesides

B-22

College of Charleston
Charleston, S. C.

B-23

Rabbi Joseph Oppenheimer

B-24

Kwick-Serve Cafe

B-25

The Citadel
Charleston, S. C.

B-26

Miss Any Martin

B-27

The Reverend Chas. E. Taylor

B-28

Hi-Way Motel

B-29

The P. T. White Co.

B-30

"Business World" Magazine B-31
President Gerald Ford B-32
First National Bank of Hollyhill Summerville, S. C. B-33

Mid Carolina High School
Prosperity, S. C.

B-34

X-Terminate, Inc.

B-35

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. Complete each activity and submit your work to your instructor who will evaluate it using the Instructor's Final Checklist, FILING ALPHABETICALLY–SPECIALIZED RULES.

OPTIONAL: Your Instructor may also elect to give you a timed retrieval test on these cards, after your work has been evaluated.

Locate the cards and cross-reference cards used in Final Checkout of Module IV A together with the cards just previously used in this module.

These 80 cards already have your indexing arrangement indicated. Proceed in arranging the entire group together into one correct alphabetic arrangement.

Submit the answer sheet to your instructor for final approval.

STUDENT'S ANSWER SHEET

FINAL CHECK-OUT ACTIVITIES

Card No.	Name	Card No.	Name
		26	

STUDENT'S ANSWER SHEET (continued)

FINAL CHECK-OUT ACTIVITIES

Card No.	Name	Card No.	Name

Instructor's Final Checklist

FILING ALPHABETICALLY–SPECIALIZED RULES

Check the student's performance in the following elements of filing alphabetically–specialized rules.

Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished, or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

	STUDENT PERFORMANCE			
	Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
1. The student indexed names correctly in preparing for filing	[ ]	[ ]	[ ]	[ ]
2. The student alphabetized names correctly in filing	[ ]	[ ]	[ ]	[ ]
3. The student prepared cross reference sheets where necessary	[ ]	[ ]	[ ]	[ ]
4. The student correctly evaluated his/her own work after each self-check	[ ]	[ ]	[ ]	[ ]

ANSWERS TO STUDENT SELF-CHECK I

1. 1 (Mr.) Anthony Armstrong-Jones
   2 Flack-Jones Lumber Company
   3 (Mr.) Jose Pina-Anduzio
2. 1 Davis-Smith Construction Co. # company
   3 Sam Soloman Co. company
   2 Sav-A-Stop Cafe X
3. 2 Thinkan-Acton International X
   1 Thom McAn Shoe Store
   3 Tri-County Development Board
4. 2 (Mrs.) Ellen P. Young
   3 Ellen Young's Plant Shop
   1 Allen-Young Plant Shop
5. 3 Wyn Shields Company X
   2 Wyman's Service Station
   4 (Mr.) Samuel S. Wynn
   5 Wynn's of Wyoming
   1 (Mr.) Wm. S. Samuels

ANSWERS TO STUDENT SELF-CHECK II

1. 1 (Col.) Cecil S. Cook
   3 Sister Cecilia
   2 (Sister) Cecilia Cook
2. 1 First National Bank, Chicago, (Illinois)
   2 First National Bank, Hollywood, (California)
   3 First National Bank, St. Louis, (Missouri)
3. 2 (The) Newberry Observer, Newberry, (S. C.)
   3 (The) Summerville Scene, Summerville, (S. C.)
   1 (The) Dispatch-News, Lexington, (S. C.)
4. 1 Lutheran Church of the Redeemer
   2 Central Methodist Church
   3 St. Peter's Cathedral
5. 2 Hotel Francis Marion
   3 Hotel Wade Hampton
   1 (The) Carolina Inn
6. 2 Myers Park High School, Charlotte, (N. C.)
   3 Carver Elementary School, Columbia, (S. C.)
   1 Burke High School, Charleston, (S. C.)
7. 1 Clemson University
   3 University of Maryland
   2 Lenoir Rhyne College

NO CROSS REFERENCE

Answers to Instruction Sheet III

PRACTICE FILING

CARD NO.	NAME
13	Amick-Martin Gravel Company
17	Baptist College of Charleston
15	Beth Shalom Synagogue
31	"Business World" Magazine
11	Catholic, Saint Peter's Church
23	Charleston, College (of)
26	Citadel (The)
12	Durham, (N. C.) Parkwood Elementary School
10	Duverger, Jean-Paul (Mr.)
3	E-Z Furniture Stripping Company
X-3	Easy Furniture Stripping Company
6	El Taco Casa
X-35	Exterminate, Inc.
32	Ford, Gerald (President)
9	Georgetown (S. C.), Winyah High School
29	Hi-Way Motel
X-29	Highway Motel
25	Kwick-Serve Cafe
20	La Fiesta Hotel
21	Los Angeles Airport
27	Martin, Amy (Miss)
X-8	New Blend Coffee Company
2	New York (N. Y.), Citizens Bank (&) Trust Company
8	Nu-Blen Coffee Company
24	Oppenheimer, Joseph (Rabbi)
7	Owens-Illinois Box Factory
4	Presbyterian, Westminster Church
34	Prosperity (S. C.), Mid Carolina High School
X-25	Quick-Serve Cafe
16	Rochester (N. Y.), First Citizens Bank (&) Trust Company
18	Rock Hill (S. C.), "Evening Herald"
14	Sikes, Helen (Dr.)
19	South Carolina Education Association
33	Summerville (S. C.), First National Bank (of) Hollyhill
28	Taylor, Charles E. (The Reverend)
5	Taylor('s), Charles Grocery Store
1	Westmoreland, William (General)
30	White, P. T. Company (The)
22	Whitesides, Grady (Professor)
35	X-Terminate, Inc.

FILING ALPHABETICALLY

SPECIALIZED RULES

INSTRUCTOR'S MANUAL

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NOTES TO TEACHER

Please review this module carefully before beginning instruction. You will note that the cards and cross reference cards from Module IV A are used along with the cards and cross reference cards from this module to complete the Checkout Activity. In order to prepare this module for student use, the instructor should duplicate the following perishable items found in the student manual:

Student Answer Sheet for Instruction Sheet III – Practice Filing, page 10
Practice Filing Sheet – Cards, pp. 11-22
Student Answer Sheet, Final Checkout Activities, pp. 24-25
Instructor's Final Checklist, p. 26

You will also need to supply scissors, a small file box, and blank cards for cross referencing.

A key for the final Checkout is provided in your manual.

MODULE IV B
KEY
FINAL CHECK-OUT

Card No.	Name	Card No.	Name
B-13	Amick-Martin Gravel Company	A-27-X	Fromly, Gerald (Mrs.)
B-17	Baptist College (of) Charleston	A 26-X	Future Business Leaders (of) America
B-15	Beth Shalom Synagogue	B-9	Georgetown, Winyah High School (S.C.)
A-28	Bryan, Chester	A-11	Gregory, J. P.
B-31	Business World Magazine	B-29	Hi-Way Motel
B-11	Catholic, Saint Peter's Church	B-29-X	Highway Motel
B-23	Charleston, College (of)	A-24	Horton, Chester
B-26	Citadel (The)	A-12	K (and) H Tire Company
A-1	Crow, Sally R.	A-14	Ken('s) Auto Repair
A-35	Davis, J.A. Company	A-15	Kentucky Termite Control
A-33	Davis, Lawrence	B-25	Kwick-Serve Cafe
A-25	Doll, Walter C.	B-20	La Fiesta Hotel
B-12	Durham, Parkwood Elementary	A-13	LeVan, Shirley R.
	School (N.C.)	B-21	Los Argeles Airport
B-10	Duverger, Jean-Paul (Mr.)	B-27	Martin, Amy (Miss)
B-3	E-Z Furniture Stripping Company	A-17	Maxwell, Donald H. (Mrs.)
B-3-X	Easy Furniture Stripping Company	A-5	McDonald, Charles
B-6	El Taco Casa	A-10	N (and) K Development Company
B-35-X	Exterminate, Inc.	B-8-X	New Blend Coffee Company
A-29	F.B.I.	B-2	New York, Citizens Bank
A-26	F.B.L.A.		(&) Trust Company (N.Y.)
A-29-X	Federal Bureau (of) Investigation		
A-8	Fischer, Fred R.		
B-32	Ford, Gerald (President)		
A-7	Fred('s) Frame Shop		
A-27	Fromly, Betty (Mrs.)		

MODULE IV B
KEY
FINAL CHECK-OUT

Card No.	Name	Card No.	Name
A-34	Newberry Drug Company	B-33	Summerville, First National Bank
A-32	Norman, Fred R. & Sons		(of) Hollyhill (S.C.)
B-8	Nu-Blen Coffee Company	A-20	Taylor, Carl R.
A-16	One Hour Cleaners	B-28	Taylor, Charles E. (The Reverend)
A-9	One Hundred Twenty-Nine Budget Basement	B-5	Taylor('s), Charles Grocery Store
B-24	Oppenheimer, Joseph (Rabbi)	A-19	Top (of the) Hill Club
B-7	Owens-Illinois Box Factory	A-21	Trusty, John
A-22	Paulson's (&) Son Paint Company	B-1	Westmoreland, William (General)
A-6	Penny, J. C. (&) Company	B-30	White, P. T. Co. (The)
B-4	Presbyterian, Westminster Church	B-22	Whitesides, Grady (Professor)
B-34	Prosperity, Mid Carolina	A-23	Williams' Insurance Agency
	High School (S.C.)	B-35	X-Terminate, Inc.
B-25-X	Quick-Serve Cafe		
A-31	Roberts, Christine (Mrs.)		
A-31-X	Roberts, William L. (Mrs.)		
B-16	Rochester, First Citizens Bank		
	(&) Trust Co. (N.Y.)		
B-18	Rock Hill, Evening Herald (S.C.)		
A-18	Rolland Manufacturing Company		
A-4	Rowe, Bobbie Jean (Mrs.)		
A-4-X	Rowe, William S. (Mrs.)		
B-14	Sikes, Helen (Dr.)		
A-3	Singer, James E.		
A-30-X A-30	Smith, George K. (See Smyth) Smyth, George K.		
B-19	South Carolina Education Association		
A-2	Standard Fire Insurance Company		